

Time & Labor Setup Overview

This Job Aid provides the agency Time and Labor Setup Administrator role guidance for the key activities involved in Time and Attendance employee setup. The employee setup process involves the assignment of time reporting attributes to employees to control the Timesheet fields and values available, and the business rules applied during Timesheet entry and processing.

In Cardinal, Time and Labor (TL) enrollments for Time Reporter Data and Comp Plans are controlled by the TL Auto Enrollment process, which automates most employee setup in Time and Attendance.

Criteria used by the TL Auto Enrollment process is configured based on state and agency policies and business practices. The TL Auto Enrollment batch process runs daily to evaluate job data changes (i.e. new hires, terminations, transfers, position changes, etc.) and assigns appropriate Timesheet reporting and processing values.

Manual employee setup steps are required for certain eligibility values and to assign employee Work Schedules. Time Reporter and Comp Plan enrollments may also need to be maintained manually in cases where the employee is an exception to the TL Auto Enrollment criteria.

The Time & Labor Setup Administrator's responsibilities include:

Monitoring TL Auto Enrollment process enrollments for accuracy

Reviewing and resolving TL Auto Enrollment process issues

Maintaining TL Eligibility for overtime leave, shift differential, and commuter imputed income

Maintaining TL Bypass and related time reporter data and comp plans as needed

Monitoring/Maintaining Work Schedule assignments

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TL Auto Enrollment Process

Monitoring TL Auto Enrollment Process Results

Job Data in Cardinal is the basis for the TL Auto Enrollment process to assign Time Reporter and Comp Plan values to employees. These Job Data fields are relevant to Time & Labor: Business Unit, Department ID, HR Status (Active or Inactive), Employee Type (Salaried or Hourly), Fair Labor Standards Act (FLSA) Status, Pay Group, Job Code, Salary Grade, Employee Class, and Absence System. In addition, TL Eligibility enrollment impacts eligibility for Shift Differential, Commuter Imputed Income, and Overtime Leave.

Changes in Job Data and TL Eligibility, including position changes, new hires, terminations, and agency transfers, are processed by the TL Auto Enrollment process. For example, terminated employees and employees with an inactive HR status will be assigned to an **Inactive** time reporting group to prevent Timesheets from being submitted or interfaced beyond the date the employee became inactive.

The Time & Labor Setup Administrator can monitor the TL enrollments for accuracy using the **Time Reporter Changes Query** and the **Comp Plan Enrollment Audit Query**. For further information about these queries, see the **HCM Reports Catalog**. The **HCM Reports Catalog** can be found on the Cardinal website under **Resources**.

- **RTA109 Time Reporter Changes Query (V_TA_TIME_REPORTER)**

V_TA_TIME_REPORTER - Time Reporter Changes

Business Unit

Dept ID

Employee ID

From Date

To Date

Download results in : [Excel Spreadsheet](#) [CSV Text File](#) [XML File](#) (25 kb)

View All First 1-34 of 34 Last

Row	Name	Employee ID	Empl Record	Position Number	Business Unit	Dept ID	HR Status	Changed On	Changed By	Changed Field	Old Value	New Value	Change Effective Date
1			0	ABCTA020	99900	100000	A	11/06/2020 9:22:41AM		ELP_TR_TMPLT_ID		VAEBASIC+1	2019-11-10
2			0	ABCTA020	99900	100000	A	11/06/2020 9:22:41AM		WORKGROUP	SNRI071P6	SNLI141P6	2019-11-10
3			0	ABCTA020	99900	100000	A	11/06/2020 9:22:41AM		RULE_ELEMENT_4	07:40	14:80	2019-11-10

- **RTA776 Comp Plan Enrollment Audit Query (V_TA_COMP_PLAN_ENROLL_AUDIT)**

V_TA_COMP_PLAN_ENROLL_AUDIT - Comp Plan Enrollment Audit

Business Unit

Department ID

Employee ID

From Date

To Date

Download results in : [Excel Spreadsheet](#) [CSV Text File](#) [XML File](#) (16 kb)

View All First 1-46 of 46 Last

Row	Employee Name	Employee ID	Employee Record	Position Number	Department ID	Business Unit	HR Status	Comp Time Plan	Comp Plan Effective Status	Comp Plan Effective Date	Username Who made the change	Date and Time Stamp	Audit Action
1			0	ABCTA020	100000	99900	A	EARNOT-CAL	A	11/10/2019	V_TA_BATCH_PROCESSOR	11/06/2020 10:36:02AM	A
2			0	ABCTA020	100000	99900	A	EARNOT-CAL	A	11/10/2019	V_TA_BATCH_PROCESSOR	11/09/2020 2:44:49PM	A
3			0	ABCTA020	100000	99900	A	EARNOT-OCS	A	11/10/2019	V_TA_BATCH_PROCESSOR	11/06/2020 10:36:02AM	A
4			0	ABCTA020	100000	99900	A	EARNOT-OCS	A	11/10/2019	V_TA_BATCH_PROCESSOR	11/09/2020 2:44:49PM	A



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If appropriate state or agency criteria do not exist to assign valid values to an employee, the employee will be assigned to the **Invalid** Workgroup, based on the employee's Job Data. The TL Setup Administrator should review the Time Report Auto Enrollment Exceptions Query to identify this issue and other enrollment issues.

- **RTA715 Time Reporter Auto Enrollment Exceptions Query (V_TA_AUTO_ENROLL_EXC)**

V_TA_AUTO_ENROLL_EXC - Time Reporter Exceptions Query

Business Unit

Dept ID

Location

Download results in : [Excel Spreadsheet](#) [CSV Text File](#) [XML File](#) (47 kb)

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Row	NAME	ID	Empl Record	Position	Type	Unit	Location	Dept ID	Descr	Group	Status	Workgroup	Taskgroup	FLSA Stat	HR Status	REASON
1			1	ABCHR001	S	99900	10000	100000	Administration	SM1	A	SNRI071P6	99900ICCO	N	I	I
2			0	ABCTA015	H	99900	10000	100000	Administration	BW3	A	INVALID	99900ICCO	P	A	B
3			0	ABCTA026	H	99900	10000	100000	Administration	BW3	A	HERF07BP1	99900ICCO	P	A	G
4			0	ABCTA035	H	99900	10000	100000	Administration	BW3	A	INVALID	99900ICCO	P	A	B

Reason codes displayed on this query help identify why each employee appears in the results. Possible Reason Codes and associated definitions are displayed in this chart:

Reason Code	Definition
A	Active Employee in Inactive Workgroup
B	Active Employee in Invalid Workgroup
C	Active Employee not in a valid Taskgroup
D	Active Employee not in a valid Workgroup
E	Active Employee with Inactive Time Reporter Status
F	Rule Element 3 is missing for Active Hourly Employee
G	Rule Element 4 is missing for Active Employee
H	Rule Element 5 is missing for Active Salaried Employee
I	Inactive Employee not in Inactive Workgroup
J	Inactive Employee with Active Time Reporter status for more than 60 days after term

The TL Setup Administrator should research and work with the HR Administrator to update Job Data as needed, consider if the employee needs to be set up as a Time Reporter manually, or contact Post Production Support (PPS) if the agency criteria for TL Auto Enrollment needs to be modified. If Job Data is corrected, the TL Auto Enrollment process will re-evaluate the employee on the next run and update the Time Reporter values.

TL Eligibility

Maintaining TL Eligibility

TL Eligibility is used to indicate employee eligibility for Shift Differential, Commuter Imputed Income, and Overtime Leave not controlled by state or agency criteria. TL Eligibility enrollments are manually maintained by the TL Setup Administrator and not by the TL Auto Enroll process. The TL Auto Enroll process uses the eligibility indicators for appropriate Time Reporter and Comp Plan enrollment.

The following TL Eligibility values are used to control employee eligibility:

- **Effective Date** – The date the TL eligibility is effective should match the date of the Job Data or eligibility change that impacts time reporting (e.g., hire, termination, transfer, position change, etc.)
- **Eligibility Type** – The option the employee is eligible for (e.g., Shift Differential, Commuter Imputed Income, Overtime Leave)

Shift Differential – Eligibility to report Shift Differential

Step – Identifies the Shift Type and Shift 2/Shift 3 rates. The fields display based on the step selected and are not editable. Shift step/rate configuration is done by PPS.

- **Shift Type** – Amount or percentage
- **Shift 2** – Rate applied when shift 2 is selected on Timesheet
- **Shift 3** – Rate applied when shift 3 is selected on Timesheet

Include OT – Indicates overtime is included in shift calculation

- **Commuter Imputed Income** – Cardinal supports automatic daily rate calculations for commuter imputed income for eligible employees at agencies with a permanently assigned state vehicle used to commute to and from work. The commuter imputed income rule will generate one day's imputed income on any day where regular hours worked and no telework code is indicated on the Timesheet. This one day's rate will be applied in payroll to increase the employee's taxable gross, which for 2020 is the rate of \$3.00 per day. Agencies that use this method must manually enroll eligible employees for the commuter imputed income rule in order to activate them.
- **Overtime Leave** – Eligibility to report overtime leave earned/taken is only applicable to agencies using Cardinal Absence Management and only needed when agency does not have Comp Plan enrollment criteria for overtime leave.
- **Status** – The eligibility status indicating if an employee is eligible for the type.
 - A = Active
 - I = Inactive



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The TL Setup Administrator can validate the TL eligibility enrollments for accuracy using **Active TL Eligibility Query** and the **TL Eligibility Audit Query**. For further information about these queries, see the **HCM Reports Catalog**. The **HCM Reports Catalog** can be found on the Cardinal website under **Resources**.

- **RTA779 Active TL Eligibility Query (V_TA_ELIGIBILITY_ENROLL_LIST)**

V_TA_ELIGIBILITY_ENROLL_LIST - Active TL Eligibility

Business Unit: 99900
Dept ID:
Emplid:
TL Eligibility Type:
As Of Date: 11/30/2020
[View Results](#)

Download results in: [Excel Spreadsheet](#) [CSV Text File](#) [XML File](#) (2 kb)

View All

First 1-7 of 7 Last

Row	Employee Name	Employee ID	Employee Record	Position Number	JOB Business Unit	Department ID	HR Status	Employee Type	FLSA Status	Employee Class	Job Code	TL Eligibility Type	COVA Eligibility Effective Date	Eligibility Business Unit	Stop	RateType	Include Overtime	Shift 2 Rate	Shift 3 Rate	Action
1				0 ABCTA025	99900	100000	A	H	P	CLS	91017	SHFT	10/19/2020	99900	1	A	Y	0.000	1.950	VERIFY
2				0 ABCTA026	99900	100000	A	H	P	CLS	91017	SHFT	11/04/2020	99900	1	A	Y	0.000	1.950	VERIFY
3				0 ABCTA035	99900	100000	A	H	P	CLS	91017	SHFT	11/10/2019	99900	3	A	Y	0.000	2.100	VERIFY
4				0 UMMW00004	84500	200402	A	N	N	CLS	19221	SHFT	11/25/2019	99900	2	A	Y	0.000	1.510	ACTIVATE

- **RTA777 TL Eligibility Audit Query (V_TA_ELIGIBILITY_ENROLL_AUDIT)**

V_TA_ELIGIBILITY_ENROLL_AUDIT - TL Eligibility Audit

Business Unit: 99900
Dept ID (Blank for all):
Employee ID (Blank for all):
From Date: 10/01/2020
To date: 11/30/2020
[View Results](#)

Download results in: [Excel Spreadsheet](#) [CSV Text File](#) [XML File](#) (1 kb)

View All

First 1-2 of 2 Last

Row	Employee Name	Employee ID	Employee Record	Position Number	Department ID	Business Unit	HR Status	Custom TA Eligibility Type	Eligibility Effective Date	Eligibility Effective Status	Step	Username who made the change	Date and Time Stamp	Audit Action- Add,Delete,Change
1				0 ABCTA025	100000	99900	A	SHIFT	10/19/2020	A	1		10/19/2020 3:54:36PM	Add
2				0 ABCTA026	100000	99900	A	SHIFT	11/04/2020	A	1		10/19/2020 10:52:44AM	Add

Accessing and Updating TL Eligibility

1. To update TL Eligibility, access the TL Eligibility page using the following path:

Navigator > Time and Labor > Enroll Time Reporters > Eligibility

The **Eligibility Search** page displays.

Eligibility
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Add a New Value

▼ Search Criteria

Business Unit

begins with ▼

Empl ID

begins with ▼

Empl Record

= ▼

First Name

begins with ▼

Last Name

begins with ▼

☐ **Case Sensitive**


Limit the number of results to (up to 300):

300

Search

Clear

Basic Search

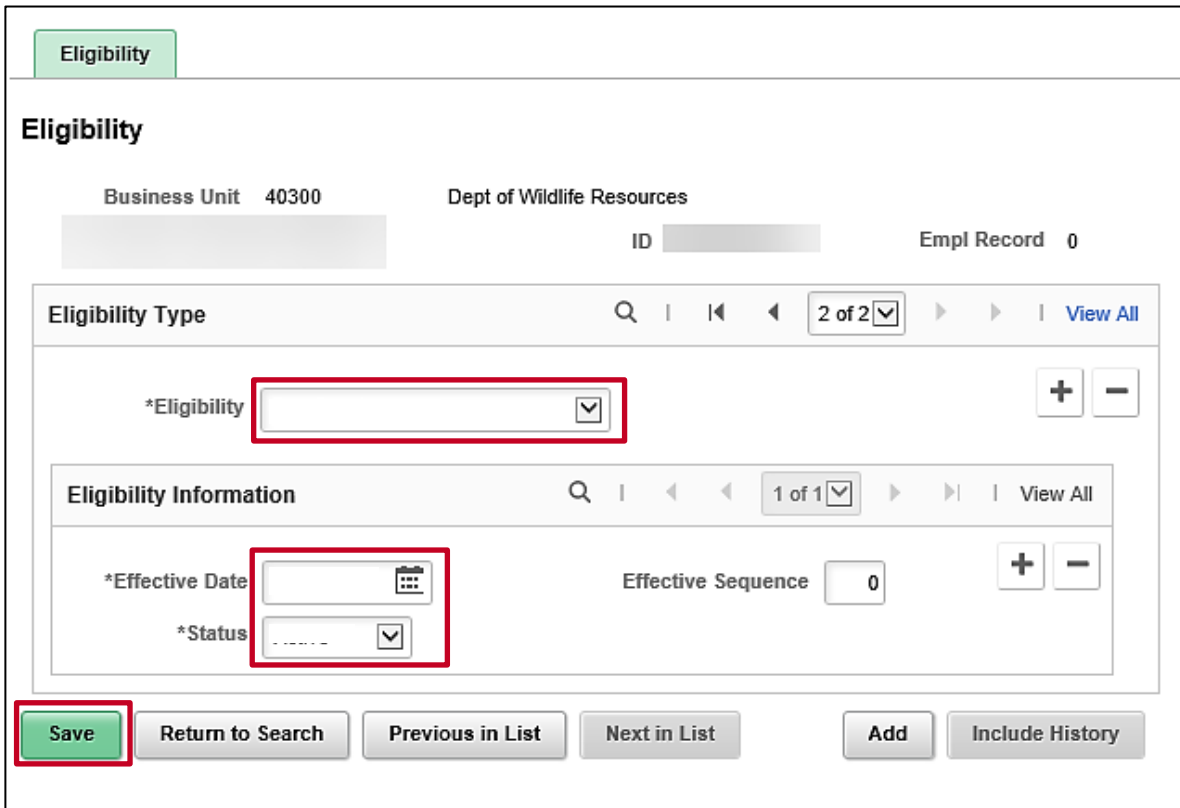
 Save Search Criteria

2. Enter the applicable Business Unit in the **Business Unit** field.
3. Enter the Employee ID or known portion of the Employee ID in the **Empl ID** field.

Note: You can also search by Employee Record or Name using the corresponding fields. However, it is recommended to use the Employee ID as it is a unique identifier for each employee.

4. Click the **Search** button.

The **Eligibility** page displays for the applicable employee.



Eligibility

Business Unit 40300 Dept of Wildlife Resources

ID Empl Record 0

Eligibility Type 2 of 2 View All

*Eligibility

Eligibility Information 1 of 1 View All

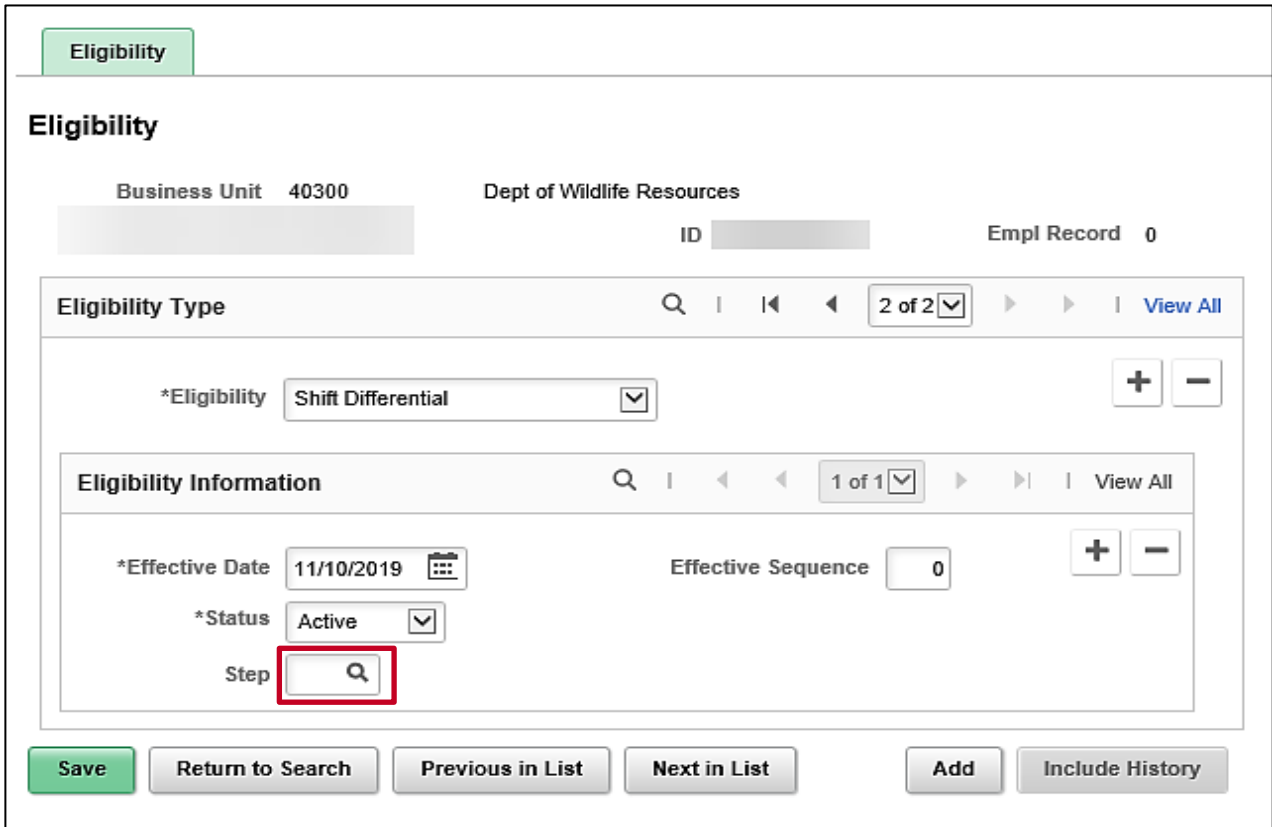
*Effective Date Effective Sequence 0

*Status

Save Return to Search Previous in List Next in List Add Include History

5. Select the applicable type of eligibility using the **Eligibility** field dropdown button.
6. Enter the applicable date in the **Effective Date** field or select the applicable effective date using the **Effective Date Calendar** icon.
7. Select **Active** using the **Status** field dropdown button. If the Eligibility selected is not **Shift Differential**, proceed to Step 9.

The **Eligibility** page refreshes with a **Step** field added when the Eligibility Selected is "Shift Differential".



Eligibility

Business Unit 40300 Dept of Wildlife Resources ID Empl Record 0

Eligibility Type 2 of 2 View All

*Eligibility Shift Differential

Eligibility Information 1 of 1 View All

*Effective Date 11/10/2019 Effective Sequence 0

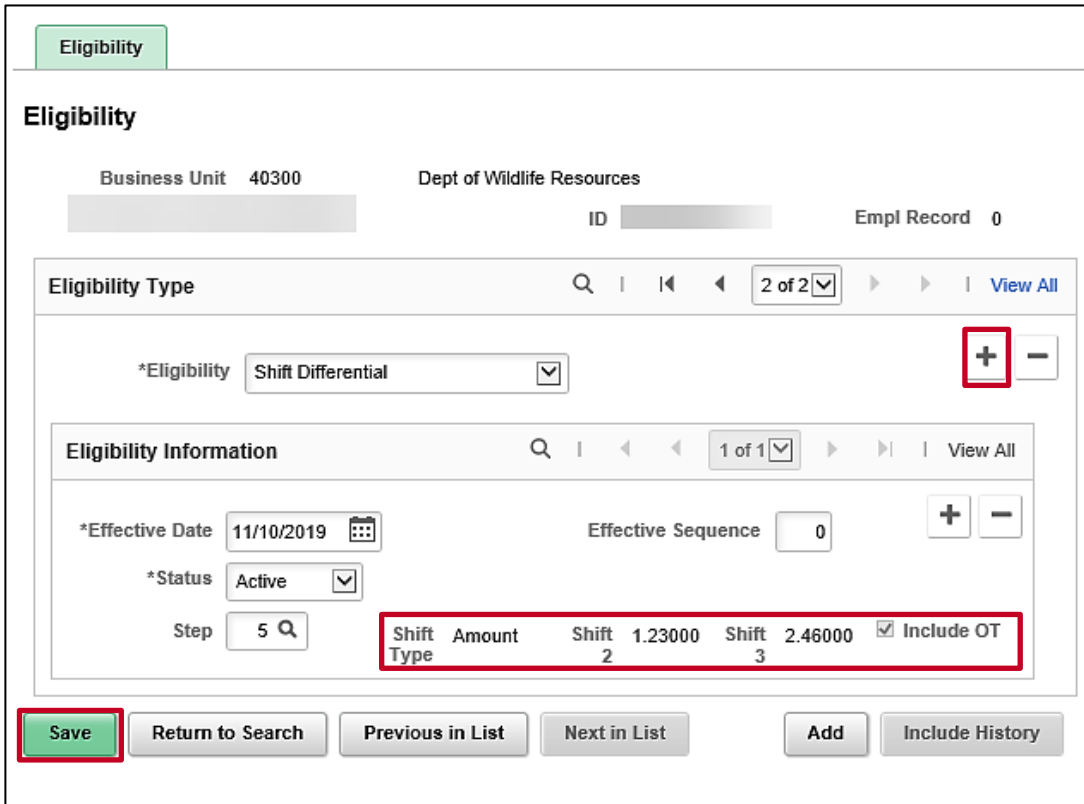
*Status Active

Step

Save Return to Search Previous in List Next in List Add Include History

8. Select the applicable Step using the **Step Look Up** icon.

The **Eligibility** page refreshes and displays the **Step** field details.



Eligibility

Business Unit 40300 Dept of Wildlife Resources

ID Empl Record 0

Eligibility Type 2 of 2 View All

*Eligibility Shift Differential + -

Eligibility Information 1 of 1 View All

*Effective Date 11/10/2019 Effective Sequence 0 + -

*Status Active

Step 5

Shift Type	Amount	Shift 2	Shift 3	Include OT
		1.23000	2.46000	<input checked="" type="checkbox"/>

Save Return to Search Previous in List Next in List Add Include History

- Click the **Add a New Row** icon (+) as applicable to add a new Eligibility Type

Note: You will need to insert a new row for each additional **Eligibility Type**.

- Click the **Save** button.

Time Reporter Data

Maintaining Time Reporter Enrollment

Time Reporter enrollment controls time reporting attributes associated with the employee, including Timesheet fields and values, and the business rules applied during Timesheet entry and processing. TL Auto Enroll assigns effective dated Time Reporter values on the **Maintain Time Reporter Data** page.

The following Time Reporter Data values are used:

Effective Date – The date the Time Reporter enrollment is effective; should match the date of the Job Data or eligibility change that impacts time reporting (i.e. hire, termination, transfer, position change, etc.)

Status – Employee status indicating if time can be reported either on the Timesheet directly or via interfaces.

A = Active

I = Inactive (employee is terminated or will not have time or absences reported in Cardinal online or via interface)

Workgroup – identifies employee that are part of a group of employees that share compensation and rule processing requirements for time reporting, FLSA Reporting, and approvals.

Taskgroup – identifies employees that are part of a group of employees that share time and task reporting requirements impacting the Timesheet fields. A Time Reporter value that identifies the Timesheet template used to collect and process time for employees.

Rule Element 3 – Indicates the Hourly ACA Yearly Limit in Hours used to generate exceptions for the 90% warning and hours exceeded error (annual limit can be overridden if allowed).

Rule Element 4 – Indicates the overtime limit or threshold for reporting overtime and rule validation for eligibility of overtime. Format: NN:MMM where NN = FLSA Period Days (e.g., 07, 14, 21, 28) and MMM = the number of hours that should be worked before overtime should be reported.

Rule Element 5 – Indicates the Compensatory and Overtime Leave Plan Limits for maximum hours allowed in balance. Format: AAA:BBB where AAA = Compensatory Leave Plan Limit and BBB = Overtime Leave Plan Limit. This is only applicable to employees/agencies using Cardinal Absence Management.

The assigned **Workgroup** for an employee identifies a group of employees that share compensation and rule processing requirements for time reporting, FLSA Reporting, and approvals. The Workgroup is a 9-character acronym where each value identifies a characteristic of the Time Reporter.

Character	Defines	Values
1st	Employee Type	H = Hourly, S = Salaried
2nd	FLSA Status	N = Nonexempt, E = Exempt
3rd	Employee Category	1 = Type 1, 2 = Type 2, 3 = Type 3 A = Additional Pay Only, P = Per Diem Type R = Regular, M = Emergency, J = Judge, L = Law Enforcement F = Fire Prevention, S = Student
4th	Approval Type	I = Reported Time for Interfaced F = Payable Time for Online Full Approval P = Payable Time for Online Partial Approval
5th – 6th	FLSA Period	07, 12, 21, 28 Days
7th	Pay Cycle	B = Biweekly, 1 = SM1, 2 = SM2, M = Monthly
8th	Time Reporter Type	E = Exception, P = Positive
9th	FLSA Start Day	1 = Sun, 2 = Mon, 4 = Wed, 6 = Fri, 7 = Sat

Workgroup Examples:

Salaried Workgroup: SERP071E6	Hourly Workgroup: HNRF07BP1
Salaried	Hourly
Exempt	Non-Exempt
Regular	Regular
P = Online Partial Approval	F = Online Full Approval
07 = FLSA Period = 07 Days	07 = FLSA Period = 07 Days
1 = Pay Cycle Semi-Monthly 1	B = Pay Cycle Biweekly
E = Exception Time Reporter	P = Positive Time Reporter
6 = FLSA Start Day Friday	1 = FLSA Start Day Sunday

The assigned **Taskgroup** for an employee identifies a group of employees that share time and task reporting requirements impacting the Timesheet fields. The Taskgroup name can be used to identify Timesheet characteristics.

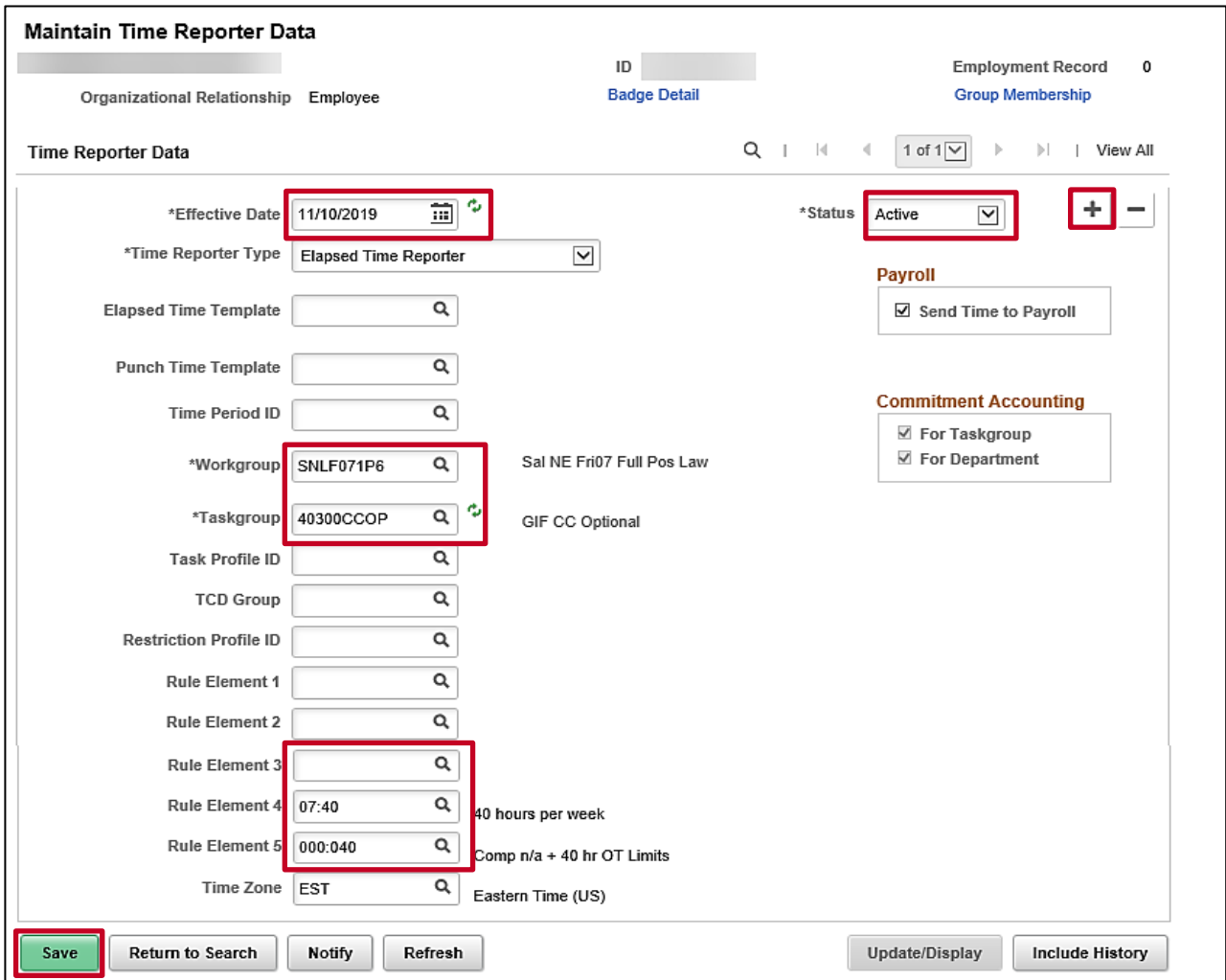
Taskgroup (XXXXX is the Business Unit)	Online or Interfacing Employee	Telecommute Field	Agency Value	ChartFields	User Field 4
XXXXXBBA	Online	Optional	Optional	Not Available	Not Available
XXXXXCCOP	Online	Optional	Optional	Optional	Not Available
XXXXXCCRQ	Online	Optional	Optional	Required	Not Available
XXXXXICCO	Interfacing	Optional	Optional	Optional	Interface Filename
XXXXXICCR	Interfacing	Optional	Optional	Required	Interface Filename
XXXXXIN	Interfacing	Optional	Optional	Not Available	Interface Filename
VANONE	Only used when employee is enrolled in the INACTIVE or INVALID workgroups				

Accessing and Updating Time Reporter Data

- To update an employee's Time Reporter Data, access the **Maintain Time Reporter Data** page using the following path:

Navigator > Time and Labor > Enroll Time Reporters > Maintain Time Reporter Data

The **Maintain Time Reporter Data** page displays.



Maintain Time Reporter Data

Organizational Relationship Employee ID [redacted] Employment Record 0
[Badge Detail](#) [Group Membership](#)

Time Reporter Data 1 of 1 View All

*Effective Date 11/10/2019 *Status Active + -

*Time Reporter Type Elapsed Time Reporter

Elapsed Time Template [search]
Punch Time Template [search]
Time Period ID [search]

*Workgroup SNLF071P6 Sal NE Fri07 Full Pos Law
*Taskgroup 40300CCOP GIF CC Optional

Task Profile ID [search]
TCD Group [search]
Restriction Profile ID [search]

Rule Element 1 [search]
Rule Element 2 [search]
Rule Element 3 [search]
Rule Element 4 07:40 40 hours per week
Rule Element 5 000:040 Comp n/a + 40 hr OT Limits
Time Zone EST Eastern Time (US)

Payroll
☒ Send Time to Payroll

Commitment Accounting
☒ For Taskgroup
☒ For Department

Save Return to Search Notify Refresh Update/Display Include History

- Click the **Add a New Row** icon (+) to insert a new row.
- Change the **Effective Date** to reflect the start date of the change.
- Update the **Status** if applicable.
- Select the **Workgroup** assigned to the employee.
- Select the **Taskgroup** assigned to the employee for task reporting.
- Update **Rule Element** 3-5 if applicable.
- Click the **Save** button.

Comp Plans

Maintaining Comp Plan Enrollment

Comp Plan enrollment controls the Time Reporting Codes (TRCs) available for reporting or interfacing on Timesheets, as well as eligibility for TRCs that are translated or generated during Timesheet processing. TL Auto Enroll assigns effective dated Comp Plans on the **Comp Plan Enrollment** page.

The following Time Reporter Data values are used:

- **Effective Date** – The date the Comp Plan enrollment is effective should match the date of the Job Data or eligibility change that impacts time reporting (i.e. hire, termination, transfer, position change, etc.).
- **Compensatory Time Off Plan** – The plan the employee is enrolled in, based on certain criteria, that gives access to specified TRCs. Some plans include access to multiple TRCs.
- **Status** – Indicates if the employee is enrolled in the Comp Plan.
 - A = Active (employee is enrolled in Comp Plan and is eligible for TRCs associated with Comp Plan)
 - I = Inactive (employee no longer has access to TRCs associated with Comp Plan)

The Time Reporting Codes available to be reported or interfaced on the Timesheet for employees enrolled in the Comp Plan(s) include:

Comp Time Plan	Time Reporting Codes (TRCs) Descriptions	TRC Selections on Timesheet
CARDINAL	Holiday, Holiday Pay Docking, Holiday Straight Extra, Office Closing	CLO, HNPM, HOLM, HOS
COMP_LEAVE	Comp Leave Earned, Compensatory Leave Taken, Comp Time Leave Payout, Comp Time Leave Adjust, Comp Time Leave Deduction, Comp Time Leave Adjust CNV, Holiday Straight Earned, for employees using Cardinal Absence Management	CALHE, CCA, CCD, CCL, CPO, ECHS, HCS, OCS, ONCHE
OT_LEAVE	Overtime Leave Earned, Overtime Leave Taken, Overtime Leave Payout, Overtime Leave Adjust, Overtime Leave Deduction, Overtime Leave Adjust CNV, for employees using Cardinal Absence Management	CALHE, ECT, OCA, OCD, OCL, OCT, OPO
PAID-OVD	OT @ Double Time	OVD
PAID-OVS	OT @ Straight Time	OVS
PAID-OVT	OT @ Time and Half	OVT
PAID-EOS	Emerg OT @ Straight Time	EOS
PAID-EOT	Paid Emerg OT @ Time and Half	EOT

Comp Time Plan	Time Reporting Codes (TRCs) Descriptions	TRC Selections on Timesheet
PAID-CALHP	Called Out Hours (Paid)	CALHP
PAID-ONCHP	On-Call Hours (Paid)	ONCHP
PAID-ONCHX	On-Call Hours (Paid @ Time and Half)	ONCHX
PAID-SWP	SelEnfor/WrkZon/PrivDty (Paid @ Time and Half)	SWP
NONPROD_PD	Not required non-productive leave codes for employees using External Leave system	ADMR, ALIR, BMOR, CCLR, CLOR, CSLR, DLRR, DSKR, DSSR, ELPR, ELWR, EMSR, ERLR, FCSR, FSKR, FVCR, LTDR, MBLR, MILR, MIPR, MLDR, OCLR, PD1R, PD2R, PERR, PHER, PLLR, SCKR, SDPR, VACR, WRIR, ALIR, BMOR, CCLR, CLOR, CSLR, DLRR, DSKR, DSRR, ELPR, ELWR, EMSR, ERLR, FCSR, FSKR, FVCR, LTDR, MBLR, MILR, MIPR, MLDR, OCLR, PD1R, PD2R, PERR, PHER, PLLR, SCKR, SDPR, WCIR
NONPROD_RQ	Required non-productive leave codes for employees using External Leave system	HCSR, HNPR, HOLR, HOSR, LNPR, STDR, STLR, WCLR, WCPR, WCSR
EARNOT-ONC	On-Call Hours (Earn) for employees using External Leave system	ONCHR
EARNAM-ONC	On-Call Hours (Earn) for employees using Cardinal Absence Management	ONCHE
EARNOT-CAL	Called Out Hours (Earn) for employees using External Leave system	CALHR
EARNAM-CAL	Called Out Hours (Earn) for employees using Cardinal Absence Management	CALHE
EARNOT-ECS	Emergency Comp Earn for employees using External Leave system	ECSR
EARNAM-ECS	Emergency Comp Earn for employees using Cardinal Absence Management	ECS
EARNOT-OCS	Comp Leave Earned for employees using External Leave system	OCSR



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Comp Time Plan	Time Reporting Codes (TRCs) Descriptions	TRC Selections on Timesheet
EARNOT-OCT	Overtime Leave Earned for employees using External Leave system	OCTR
EARNOT-ECT	Emergency OT Leave Earned for employees using External Leave system	ECTR
EARNAM-ECT	Emergency OT Leave Earned for employees using Cardinal Absence Management	ECT
AMNT-ONC\$\$	On-Call Amount	
AMNT-CAL\$\$	Called Out Amount	
AMNT-DIF\$\$	Weekend/Holiday Diff Amount	
AMNT-MED\$\$	MedicationAmount	

Note: Some TRCs can only be accessed by TL Administrators on the Timesheet page. The amount Comp Plans show (indicated by \$\$) should not be assigned unless the agency is interfacing and is already approved to use them.

State Default Enrollments

This section provides the state default enrollments by the categories listed below:

Cardinal leave system of record

- **CARDINAL** - All Salaried Exempt and Non-Exempt employees giving access to Reported TRCs for Office Closure (CLO), Holiday related (HOLM, HNPM, HOS) that are paid on a semi-monthly basis. This should never be overridden at the agency level.
- **COMP_LEAVE** - All Salaried Exempt and Non-Exempt employees that are paid on a semi-monthly basis giving access to Reported TRCs for Comp Leave Earned (OCS), Comp Leave Taken (CCL) and Holiday Comp (HCS). This can be overridden at the agency level. This plan also tracks the Leave Balance.
- **OT_LEAVE** - All Salaried non-exempt employees that are paid in a semi-monthly basis giving access to Reported TRCs for Overtime Leave Earned (OCT) and Overtime Leave Taken (OCL). This can be overridden at the agency level to be either no access or use Overtime Leave Eligibility to selectively grant access to employees. If an agency does not payout Overtime Leave balance at the time a Salaried employee transfers from non-exempt to Exempt, state default keeps OT_LEAVE enrollment (to use the remaining leave balance only) based on the employee specific Overtime Leave Eligibility. This plan also tracks the Leave Balance.

External leave system of record

- **NONPROD_RQ** - All Salaried Exempt and Non-Exempt employees that are paid on a semi-monthly basis giving access to Reported TRCs for holiday related (HOLR, HNPR, HOSR, HCSR), Pay Docking (LNPR), Short Term Disability (STDR, STLR) and Workers Compensation (WCLR, WCPR, WCSR). This should never be overridden at the agency level.
- **NONPROD_PD** - All Salaried Exempt and Non-Exempt employees that are paid on a semi-monthly basis giving access to most other Reported TRCs for Leave Taken (for example VACR, SCKR, CCLR, OCLR). This can be overridden at the agency level.
- **EARNOT-OCS** - All Salaried Exempt and Non-Exempt employees that are paid on a semi-monthly basis giving access to Reported TRCs for Comp Leave Earned (OCSR). This can be overridden at the agency level.
- **EARNOT-OCT** - All Salaried non-exempt employees that are paid on a semi-monthly basis giving access to Reported TRCs for Overtime Leave Earned (OCTR). This can be overridden at the agency level.

Paid Overtime

- **PAID-OVS** - Employees with the ability to report paid straight time Overtime giving access to the Reported TRC OVS is granted to Hourly Exempt and Salaried non-exempt. This can be overridden at the agency level.
- **PAID-OVT** - Employees with the ability to report paid time and half Overtime giving access to the Reported TRC OVT is granted to Hourly non-Exempt and Salaried non-exempt. This can be overridden at the agency level.

Accessing and Updating Comp Plans

- To update an employee's **Compensatory Plan Enrollment**, access the **Comp Plan Enrollment** page using the following path:

Navigator > Time and Labor > Enroll Time Reporters > Comp Plan Enrollment

The **Compensatory Plan Enrollment** page displays.

Compensatory Plan Enrollment

Empl ID

Empl Record 0

Comp Plan Enrollment

1 of 1

View All

*Effective Date 11/10/2019

+

-

Valid Comp Time Off Plans for Time Reporter

1-3 of 5

View All

*Compensatory Time Off Plan	Description	*Status		
CARDINAL	Cardinal Leave	Active	+	-
COMP_LEAVE	Compensatory Leave Plan	Active	+	-
OT_LEAVE	Overtime Leave Plan	Active	+	-

Save

Return to Search

Notify

Refresh

- Click the **Effective Date Add a New Row** icon (+).
- Update the **Effective Date** to reflect the date of enrollment.
- Click the **Add a New Row** icon (+) in the **Compensatory Time Off Plan** section to insert a new row for an additional Comp Plan.



Time & Attendance Job Aid

TA372 TL Setup Overview

The **Compensatory Plan Enrollment** page returns and the new row is added.

Compensatory Plan Enrollment

TRAINING BU_40300_TAE001

Empl ID 00900126400

Empl Record 0

Comp Plan Enrollment

1 of 2

View All

*Effective Date 08/13/2020

+

-

Valid Comp Time Off Plans for Time Reporter

1-6 of 6

View 3

*Compensatory Time Off Plan	Description	*Status		
CARDINAL	Cardinal Leave	Active	+	-
COMP_LEAVE	Compensatory Leave Plan	Active	+	-
OT_LEAVE	Overtime Leave Plan	Active	+	-
PAID-OVS	Paid OT @ Straight Time	Active	+	-
PAID-OVT	Paid OT @ Time and Half	Active	+	-
			+	-

Save

Return to Search

Notify

Refresh

5. Select the **Look Up** icon to search for Comp Plans.



Time & Attendance Job Aid

TA372 TL Setup Overview

The **Look Up Compensatory Time Off Plan** displays in a pop-up window.

Compensatory Plan Enrollment

TRAINING BU_40300_TAE001 Empl ID 009001264

Comp Plan Enrollment

*Effective Date 08/13/2020

Valid Comp Time Off Plans for Time Reporter

*Compensatory Time Off Plan	Description
CARDINAL	Cardinal Leave
COMP_LEAVE	Compensatory Leave Plan
OT_LEAVE	Overtime Leave Plan
PAID-OVS	Paid OT @ Straight Time
PAID-OVT	Paid OT @ Time and Half

Look Up Compensatory Time Off Plan

Compensatory Time Off Plan begins with

Description begins with

Search Clear Cancel Basic Lookup

Search Results

View 100 1-25 of 25

Compensatory Time Off Plan	Description	Short Description
AMNT-CAL\$\$	Callout Amount	Callout \$\$
AMNT-DIF\$\$	Weekend/Holiday Diff Amount	Diff \$\$
AMNT-MED\$\$	Medication Amount	Medicn \$\$
AMNT-ONC\$\$	On Call Amount	On Call \$\$
CARDINAL	Cardinal Leave	Cardinal
COMP_LEAVE	Compensatory Leave Plan	Comp Leave
EARNAM-CAL	Callout Hours (Earn)	Callout Hr
EARNAM-ECS	Emergency Comp Earn	ECMP Earn
EARNAM-ECT	Emergency OT Leave Earned	EOTL Earn
EARNAM-ONC	On Call Hours (Earn)	On Call Hr

6. Select the appropriate plan from the **Compensatory Time Off Plan** column.

The **Compensatory Plan Enrollment** page returns with the new plan displayed.

Compensatory Plan Enrollment

TRAINING BU_40300_TAAE001

Empl ID 00900126400

Empl Record 0

Comp Plan Enrollment

1 of 2

View All

*Effective Date 08/13/2020

+

-

Valid Comp Time Off Plans for Time Reporter

1-6 of 6

View 3

*Compensatory Time Off Plan	Description	*Status		
CARDINAL	Cardinal Leave	Active	+	-
COMP_LEAVE	Compensatory Leave Plan	Active	+	-
OT_LEAVE	Overtime Leave Plan	Active	+	-
PAID-OVS	Paid OT @ Straight Time	Active	+	-
PAID-OVT	Paid OT @ Time and Half	Active	+	-
AMNT-DIF\$\$	Weekend/Holiday Diff Amount	Active	+	-

Save

Return to Search

Notify

Refresh

- Select the appropriate **Status** from the dropdown for the Comp Plan.
- Repeat steps 4-7 to add additional applicable **Compensatory Time Off Plans**.
- Click the **Save** button.

TL Bypass Auto Enroll

Maintaining TL Bypass

Agencies have the ability to bypass the TL Auto Enroll process for an employee and maintain the employee's Time Reporter data and/or Comp Plans manually using the TL Bypass feature. TL Auto Enroll checks the TL Bypass Auto Enroll selections to determine if the employee should be skipped from the default Time Reporter and/or Comp Plan enrollment processing. Generally, the TL Bypass feature should not be used unless the TL Auto Enroll process did not enroll the employee appropriately and there are no criteria that could be configured for the agency to identify and enroll the employee as needed.

Any Time Reporter Data or Comp Plan enrollments that are manually updated, except for the few exceptions noted at the end of this section, require the employee to be set up for TL Bypass by the TL Setup Administrator in order to preserve the manual updates. Otherwise, the TL Auto Enrollment process will overwrite the manual changes with the default values based on state and agency criteria. If an employee is set for bypass, ALL Time Reporter and/or Comp Plan values must be maintained manually for the employee. It is recommended to deactivate TL Bypass for employees when there is no longer a need for bypass or upon termination to ensure the TL Auto Enrollment process does not bypass the employee if later rehired.

The use of TL Bypass Auto Enroll should be rare. Consider contacting PPS to review your agency criteria. Ideally, agency criteria can be added or modified to appropriately identify employees for default Time Reporter and Comp Plan enrollments.

Examples of valid reasons to bypass an employee:

- Agency does not offer compensatory leave as a business practice, but individual employees could be granted compensatory leave on a case by case basis. The employee could be set up for TL Bypass for Comp Plans and the TL Setup Administrator can activate the **COMP_LEAVE** plan for the employee manually.

Agency does not pay overtime to salaried exempt employees as a business practice, but individual employees could be eligible to be paid overtime in certain emergency or other special circumstances. The employee could be set up for TL Bypass for Comp Plans and the TL Setup Administrator can activate the **PAID-OVS** or **PAID-OVT** plan for the employee manually.

The following TL Bypass values are used to bypass the employee from TL Auto Enroll process:

Effective Date – The date the bypass is effective

Bypass Time Reporter Data – Selection indicates TL Auto Enroll will bypass the Time Reporter enrollment (Workgroup, Taskgroup, Rule Elements) and the values must be maintained by the TL Employee Setup Administrator manually, including when there are Job Data changes.

Bypass Comp Plan – Selection indicates TL Auto Enroll will bypass the Comp Plan enrollment and the plans must be maintained manually, including when there are Job Data changes.

Using the TL Bypass feature for an employee is not necessary in the following cases:

Workgroup – 4th character can be manually changed from 'P' to 'F' or from 'F' to 'P' to change between full and partial approval.

Workgroup – 8th character can be manually changed for salaried employees from 'E' to 'P' or 'P' to 'E' to change between exception and positive time reporter.

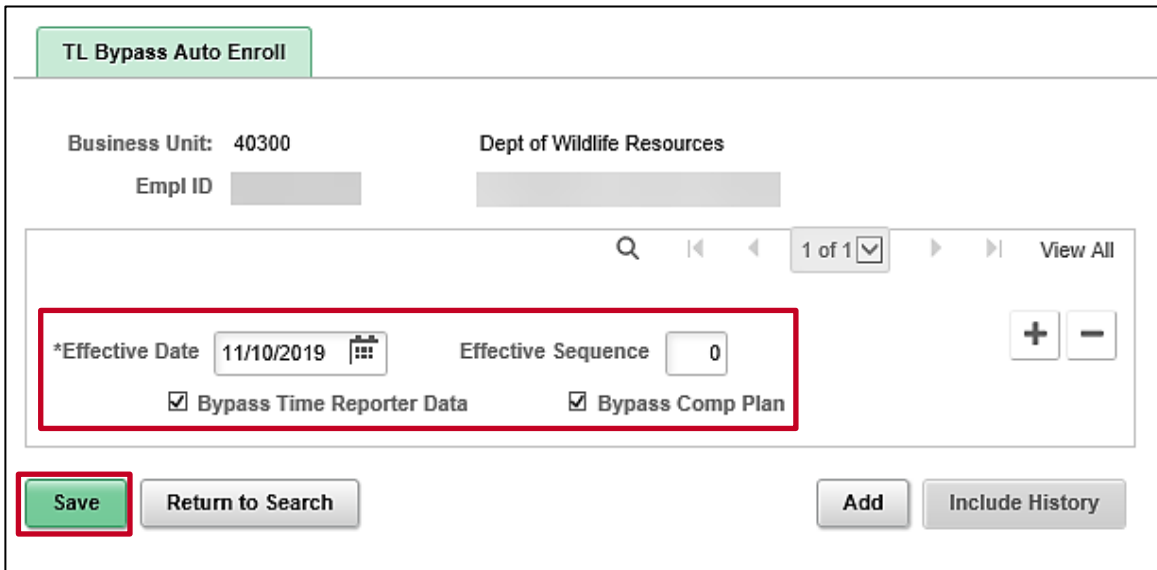
Rule Element 3 – Hourly ACA Yearly Limit in Hours can be manually changed for hourly employees to increase or decrease the default limit.

Access and Update TL Bypass

1. To update TL Bypass for an employee, access the **TL Bypass Auto Enroll** page using the following path:

Navigator > Time and Labor > Enroll Time Reporters > TL Bypass Auto Enroll

The **TL Bypass Auto Enroll** page displays.



2. Enter the **Effective Date** to begin or end the TL Auto Enroll Bypass.
3. Check or uncheck the Bypass Time Reporter Data or Bypass Comp Plan checkbox.
4. Click the **Save** button.



Work Schedules

Maintaining Work Schedules

Each employee must have an assigned Work Schedule in Cardinal. Work Schedules are assigned to employees by either the TL Setup Administrator, the TL Administrator, or the TL Supervisor. Timekeepers can only view employee schedules.

Types of schedules are:

Hourly – This is a schedule with zero hours. Hourly employees must report all hours in order to be paid.

Set Schedule – This is a non-flexible schedule with predictable days and hours. A set schedule could also include a rotating pattern.

Variable Schedule – This is a flexible schedule that is set up in the system as 24 hours a day, 7 days a week. This type of schedule requires an employee to report all hours.

Example of an **Assign Work Schedule** page:

Assign Work Schedule

Employee ID

Police Sergeant

Employment Record 0

Actions*

Assign Schedules ?

Details

*Effective Date	*Assignment Method	Schedule Group	Schedule ID	Description	Rotation ID	Show Schedule		
11/10/2019	Select Predefined Schedule	STATE	40.00-Z88888Z-0	5x8 hour days - 2 OFF together	SASU	Show Schedule	+	-

View history of Schedule Assignments, including default changes

Save

Return to Search

Refresh

Update/Display

Include History

Schedule Naming Convention:

SETID = STATE, 7-Day

Format: NN.NN-AAAAAAA-B, Example: 40.00-Z88888Z-0

Character	Defines	Value
NN.NN	Schedule Hours for the week	Example: 40.00, 37.5
AAAAAAA	7 day indicator – first character is Day1, second character is Day2, etc.	0-9, A-X: for example Z – Off Day 0 – If the hours for the day are between 0.01 and 0.99 1 – If the hours for the day are between 1.00 and 1.99 A – If the hours for the day are between 10.00 and 10.99 B – If the hours for the day are between 11.00 and 11.99 X – If the hours for the day are 24.00
B	Indicates a unique schedule	0-9, A-Z – to indicate a unique schedule

SETID = STATE, 9X80

Format: 9X80-AAAAAAA-B, Example: 9X80-Z9998ZZ-0

Character	Defines	Value
AAAAAAA	7 day indicator – first character is Day1, second character is Day2, etc.	0-9, A-X: for example Z – Off Day 0 – If the hours for the day are between 0.01 and 0.99 1 – If the hours for the day are between 1.00 and 1.99 A – If the hours for the day are between 10.00 and 10.99 B – If the hours for the day are between 11.00 and 11.99 X – If the hours for the day are 24.00
B	Indicates a unique schedule	0-9, A-Z – to indicate a unique schedule

Note: 9X80 schedules must not be assigned to nonexempt employees.

Day1 in the 14 day schedule will correspond to a Biweekly Pay Period Begin Date in Cardinal – used by Hourly employees.



Time & Attendance Job Aid

TA372 TL Setup Overview

SETID = <Business Unit>

Format: NN.NN-AAAAAAA-B, Example: 40.00-5X8X3WK-0

Character	Defines	Value
NN.NN	Schedule Hours for the week	Example: 40.00, 37.5
AAAAAAA	7 day indicator – first character is Day1, second character is Day2, etc.	Example: 4X10+5X8 – Week 1 is a 4 day/10 hour work week, and Week 2 is a 5 day/8 hour work week. 4X10X2WK - Week 1 is a 4 day/10 hour work week, and Week 2 is also a 4 day/10 hour work week, however the work days are not the same for each week. 4X10+OTH – Week 1 is a 4/day/10 hour work week, and Week 2 is some other type of work week that is not 5X8 or 4x10.
B	Indicates a unique schedule	0-9, A-Z – to indicate a unique schedule

The **RTA717 - Employee Schedule Review** query can be used to identify work schedule issues that should be resolved. The query lists employees without a schedule or with a default schedule. All employees must be assigned a Predefined Schedule.

V_TA_SCHEDULE_REVIEW - Employee Schedule Review

Business Unit:

Dept ID (blank for all):

Empl ID (blank for all):

Download results in: [Excel Spreadsheet](#) [CSV Text File](#) [XML File \(71 kb\)](#)

View All First 1-79 of 79 Last

Row	Name	Employee ID	Empl Record	Position	Location	Job Code	Unit	Dept ID	Type	FLSA Stat	Reports To	Current HR Status	Workgroup	Reason
1			1	ABCHR001	10000	69034	99900	100000	S	Nonexempt		Active	SNRI071P6	Employees with Missing Schedule
2			0	ABCTA026	10000	91017	99900	100000	H	Nonexempt	ABCTA015	Active	HNRI07BP6	Employees with Missing Schedule
3			1	ABCTA001	10000	19031	99900	100000	S	Professional		Active	SERI071P6	Employees with Missing Schedule
4			0	ABCTA022	10000	91017	99900	100000	H	Nonexempt		Active	HNRI07BP6	Employees with Missing Schedule
5			1	ABCTA024	10000	91017	99900	100000	S	Nonexempt	ABCTA015	Active	SNRI071P6	Employees with Missing Schedule

For further details on assigning Work Schedules, see the Job Aid titled **TA373 Maintaining Employee Work Schedules** located on the Cardinal Website in **Job Aids** under **Learning**.